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ABSTRACT

While some people have difficulty adjusting to retirement, others seem to adjust easily. The search for theory to explain the source of positive retirement may require research methods to develop theory rather than to test theory. Grounded theory methodology was used to determine the characteristics and sources of characteristics of adults who had retired in a positive way. Adults in nine settings in the United States and England were asked to name persons in their communities who had retired in a positive way and to identify characteristics that caused them to name these persons. The retirees (N=139) most often named were interviewed about their lives, and were asked what characteristics they had to a greater extent than most retirees. The most named characteristics reflecting a positive retirement were, in rank order, volunteerism, liking people, busy and active, purposeful, happy, forward looking, independent, still learning, hard working, and involved in civic activities. The most named sources of these characteristics were home and family, work, and youth and adult organizations. The data also indicated that a positive retirement developed early in life. The results suggest that a substantive "Theory of Purpose" may be the key to positive retirement. (NRB)

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# ADULTS WHO HAVE RETIRED IN A POSITIVE WAY: A SEARCH FOR THEORY

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## Introduction

This research focuses on persons who were judged to have retired in a positive way. It is different from most studies of the older years that relied on financial support which was granted because a problem was identified. The problems of ill health, forced retirement, nursing home residency and widowhood all contributed to the development of hypotheses and theories that are standard in the gerontological literature.

This research was different. Rather than beginning with a problem, hypotheses or theory it was determined to examine retired adults in normal life settings (the small community, community's senior centers, age segreated housing complexes, etc.). This approach had the likelihood of identifying positive role models and the potential of challenging the myths that are held about older persons. Who were the adults in these settings who had retired in a positive way? What were their characteristics? If there were common characteristics across a variety of settings, what are the sources of these characteristics in the life span? If there were both common characteristics and common sources, would this suggest substantive theory that deserved further investigation?

It was with the above research objectives in mind that the methodology and procedures were developed.

## Method

Framework - the search for hypotheses and theory to help explain the source of retirement that is positive required research methods and procedures to develop theory rather than to test theory. Grounded theory as initially described (Glaser and Strauss, 1967) was the basic framework for this investigation. No definition of a positive retirement was used. The perception of

a positive retirement held by those interviewed to select the primary sample was the base. Consistency of selection among various settings would determine whether a definition could even be attempted.

Selection Procedure - The settings for investigation were selected for their diversity. In the development of theory investigators search for consistency across settings that are not alike. The nine settings were not chosen to be convenient for the investigators; they were chosen to be diverse.

Within the nine settings a procedure was used to provide reasonable assurance that the subjects (+Rs) of the investigation were considered by others to have retired in a positive way. This was accomplished by reputational interviews. For example, in a small midwestern resort community of 1500 persons and a higher than average number of older adults, 22 adults from business, social services, and community leadership were individually interviewed and asked to name the persons in the community whom they believed had retired in a positive way. This process was used in the nine settings. Following the naming of the persons, they were asked to identify the characteristics that caused them to name them. In this midwestern community 136 different persons were named. The 19 persons most often named were then chosen to be interviewed in depth. The nine settings for the research, the population base of the setting and the number of +R interviewed are presented in Table 1.

Table 1. The Nine Settings for the Research, Population Base of Each Setting and Number of +R Interviewed.

| Setting | | Selection Base | | |
|---|---|---|---|---|
| Georgraphic | Type | Population or Members | | +R Interviewed |
| Midwest | Rural resort community | 1,500 | | 19 |
| Midwest | Small city, Senior Complex | 10,000 | | 22 |
| Midwest | Urban, Senior Center[a] | | 150 | 10 |
| Midwest | Urban, Senior Center[a] | | 140 | 12 |
| Southeast | Urban, high rise age segregated | | 400 | 16 |
| Far West | Urban, Senior Center[b] | | 2200 | 19 |
| England | Resort community | 20,000 | | 20 |
| England | Urban, community center[c] | | 150 | 11 |
| England | Urban, community center[c] | | 150 | 11 |
| TOTAL | | | | 140[d] |

a Black

b Oriental

c Working class

d Included were 62 males and 77 females; among them were 20 couples where husband and wife had been selected individually

Interview Procedure - The interviews were performed in three stages and responses stored in notes and a taped record. The first two stages were totally open-end. The first stage included notifying the interviewee that he had been selected by reputation. He was then asked to provide a short four to five minute review of important events in his life from the earliest remembered through the present period of retirement. During the second stage of the interview, questions were asked as to why the interviewee thought others selected him; what he believed the characteristics were that he had to a greater extent than did other people and the source of these characteristics in his life span. The third stage of the interview was reserved for the collection of demographic and personal data including entry into retirement, perception of his own health and finances, age, etc.

Analysis - Qualitative and quantitative analysis were used. Subjective descriptions were developed of each interviewee based on original notes and the taped record. Responses to the open-end questions were summarized for each setting and compared among settings. The ten characteristics of the +R with rank orders consistently high in the nine settings were chosen as the basis for examining the source of the characteristics. Both qualitative and quantitative findings were examined to determine whether or not these data would relate to an existing or new theoretical framework. Further analysis was made of the interviewee's life reviews, open response and demographic characteristics.

Results

Identification and ranking of the characteristics of the +R were described first, followed by identification and ranking of the sources of these characteristics in the life span of the +R. A theory is proposed for consideration and development.

Characteristics - The personal characteristics that the 140 interviewees believed they had to a greater extent than did other retired persons are presented in Table 2. The highest ranking characteristic was that of being a volunteer. This included a number of responses all identified with giving help to others. Ninety eight of the 140 +Rs in the sample believed they had more of this characteristic than did other people. In the second ranking 83 of the 140 identified their being sociable and liking people as a key characteristic. Of the first ten ranked characteristics all except liking people and being happy were clearly linked with an interviewee's purpose for his later years. Interviewees' statements about liking people and being happy provided some basis to conclude that purpose was also a part of these. Two characteristics ranked in Table 2, purposeful and forward looking have much in common. Were they joined in a single category labeled purposeful and forward looking, the item would be ranked second.

Source - Table 3 and Table 4 describe the source of positively retired persons' characteristics in two forms. In Table 3 related factors were clustered; for example under family were all the interviewee responses as to the source of their characteristic that related to family and included family, father, mother, parents, brothers, sisters, grandparents, etc. Because of this clustering family was the highest ranking source. In Table 4 specific response patterns were summarized and ranked. Family was ranked number two, mother was ranked five and father ranked six. Work as a source of the +Rs characteristics was always identified as an individual factor and was not clustered with any other item. Work was in second rank among all items when clustered (Table 3) and was in first rank when individual categories were ranked (Table 4). From these data it was clear that the characteristics associated with a positive retirement were most often developed early in life rather than just before or after retirement.

Theory - Although this investigation was not designed to test existing theories the grounded findings did make it possible to examine theories in a general way. In interviewing it was clear from the outset that Disengagement was an inappropriate theory to explain the life of the +R person. One interviewee stated it well, "I didn't retire from something, I retired to something."

The theory to which the +R seemed to relate most closely was that of Activity. Within the sample were many individuals whose expressions clearly coincided with what has been written concerning the Activity Theory. This group believed that a long, happy, and successful retirement came from keeping mind and body active. As one interviewee said about giving advice to those whose retirement is negative, "I tell them to get off of their ass."

There were numerous indications that the +R were still developing. Goals of the early and mid years of life that had to be bypassed in order to earn a livelihood suddenly reappeared and development in both physical and mental efforts were focussed in these directions. Among the most visible of these were the number of interviewees with artistic talents. In retirement these talents, left fallow since adolescence, became the basis for new goals, new growth and deep satisfactions.

Were there an existing Theory of Purpose it would be clear from the 140 interviews that this was the key to a positive retirement. It is from this perception that a substantive Theory of Purpose was suggested by the authors and testing of that theory and its related hypotheses highly recommended. Within the data of the study, the purpose of all but a very few of the +R was the energy source that caused them to volunteer, to work part time, to bring cheer to their friends or to "get involved" in civic action.

For many +R it was some social purpose that drove economic and health problems into the background and brought volunteering to help others to the forefront.

## Summary

Using Grounded Theory 140 persons were interviewed. They were selected by others in their community as having retired in a positive way. This investigation identified the characteristics of such +R persons, the sources of these characteristics in the life span and suggested a substantive theory for further testing.

Among the characteristics most prevalent in the +R were that they volunteered their services, were sociable and liked people, were busy and active and were deliberately purposeful. The main sources of these characteristics were the home and family in childhood and youth, the world of work, a natural quality, youth and adult clubs and organizations and having faced and overcome crises.

A substantive Theory of Purpose was suggested for further research and testing. The characteristics of the +R identified in this investigation were grounded in some purpose for which they strove.

## References

Glaser, B.G. and A. L. Strauss, The discovery of grounded theory: strategies for qualitative research. Aldine Publishing Company, New York, 1967.

Table 2. The personal characteristics that the 139 persons, selected for having retired in a positive way, believed they had to a greater extent than did others. The ten characteristics most often identified are listed below in rank order.

| Characteristics | Number of times identified | Rank |
|---|---|---|
| Volunteers - service to others, sharing, generous, concern for others | 98 | 1 |
| Likes people - sociable, kind, loving, gets along well with others | 83 | 2 |
| Busy and active - looks for things to do, a participator, hobbies, broad interests | 72 | 3 |
| Purposeful - will carry through, seeks to achieve, tries to do useful things | 56 | 4 |
| Happy - contented, calm, enjoys life, joyful, outgoing, even tempered | 49 | 5 |
| Forward looking - positive in outlook, optimistic, creative, open-minded | 37 | 6 |
| Independent - pays own way, does own thing, free, assertive | 33 | 7 |
| A learner - loves to learn, keeps mind busy, curiosity | 22 | 8 |
| A worker - has the work ethic, works hard when working | 21 | 9 |
| Civically active - involved in community affairs | 17 | 10 |
| Other characteristics identified seven or more times were Religious n=15, Honesty n=15, Physically able n=10, well known n=7. In addition 12 persons identified things they "were not," ie, "not self-centered," "no moaning and groaning," "not bored," etc. | | |

Table 3. What are the sources of the characteristics that the positively retired persons believed they had to a greater extent than did others? The sources of the ten most often identified characteristics are listed in rank order with the sources clustered rather than individual, ie., family, home, mother, father, spouse, etc. are placed in a single category "Family."

Characteristics

| Rank order of source | Volun-teer | Likes people | Busy & active | Purpose-ful | Happy | Forward looking | Inde-pendent | A learner | Works hard | Civic ac-tivities |
|---|---|---|---|---|---|---|---|---|---|---|
| Family | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| Work | 7 | 3 | 3 | 3 | 3 | 3 | 3 | 2 | 2 | 2 |
| Natural | 4 | 2 | 6 | 4 | 2 | 2 | 4 | 3 | 4 | 6 |
| Organizations | 3 | 5 | 2 | 5 | 4 | 4 | 6 | 3 | 3 | 3 |
| Crises | 2 | 4 | 4 | 2 | 4 | 4 | 2 | 10 | 7 | 4 |
| Schools | 8 | 5 | 7 | 6 | 7 | 6 | 8 | 5 | 7 | 5 |
| Retirement | 6 | 9 | 4 | 6 | 7 | 7 | 10 | 6 | 4 | 10 |
| Church (Religion) | 5 | 5 | 10 | 9 | 7 | 8 | 5 | 7 | 7 | 6 |
| Models | 9 | 8 | 8 | 8 | 6 | 8 | 7 | 7 | 4 | 6 |
| Community | 10 | 10 | 9 | 10 | 7 | 10 | 8 | 10 | 10 | 10 |

Table 4. What are the sources of the characteristics that the positively retired persons believed they had to a greater extent than did other persons? The sources of the ten most often identified characteristics in individual categories are listed in rank order.

| | Characteristics | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| Rank order of source | Volunteer | Likes people | Busy & active | Purposeful | Happy | Forward looking | Independent | A learner | Works hard | Civic activities |
| Work | 6 | 3 | 2 | 1 | 3 | 1 | 1 | 1 | 1 | 1 |
| Family | 1 | 1 | 1 | 2 | 1 | 3 | 2 | 6 | 1 | 3 |
| Natural | 2 | 1 | 3 | 3 | 2 | 1 | 2 | 3 | 2 | 9 |
| Community organizations | 3 | 9 | 3 | 6 | 8 | 5 | 9 | 3 | 2 | 2 |
| Mother | 5 | 4 | 7 | 3 | 4 | 3 | 9 | 3 | * | 9 |
| Father | 11 | 5 | 5 | 5 | 4 | 16 | 4 | 2 | 7 | 3 |
| School | 13 | 6 | 10 | 11 | 12 | 6 | 16 | 6 | 7 | 9 |
| Church organizations | 9 | 17 | 8 | 15 | 8 | 8 | 9 | * | 7 | * |
| Illness of self and others | 7 | 17 | 12 | 7 | 12 | * | 6 | * | * | * |
| Church | 14 | 9 | * | 15 | 19 | 8 | 9 | * | 7 | * |
| Religion | 11 | 14 | * | * | 12 | * | 9 | 11 | * | * |

*Not mentioned as a source and given a mean rank of 14 for each time not mentioned.